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ETHICS AS CULTURE
*Participant Workbook*

2016

**Ethics Scenarios**

**Policy Case Scenarios:**

1. An Invitation
2. Kevin’s Dilemma
3. Sally’s Billable Hours
4. Providing Referrals
5. Follow Recruitment Policies
6. Credit Where Credit is Due

The Policy Case Scenarios above can be part of pre-reading; not necessary for in-person training.

1. Managing Client Relationships
2. Separating Personal and Client Relationships
3. Targeted Marketing
4. Maintaining Trust
5. Voting Rally

**Ethical Dilemma Scenarios:**

1. Sam’s Assignment
2. Product Safety
3. Sandy & Jim
4. Relevance of the Past
5. How Much to Report
6. What Kind of Press Release?
7. Taking an Assignment
	1. There are two scenario options*.*
8. Employee Layoffs
9. Award Nomination
10. Maintain Client Confidentiality
11. Twice the Work, Half the Effort
12. Promoting the Truth
13. Client Relations
14. Security Breach
15. Media Coverage
	1. There are two scenario options*.*
16. Opinions About Competition
17. Dealing with Client Conflict
	1. There are two scenario options.
18. Transparency Is Not Just a Social Media Issue
19. New Business vs. Existing Clients
20. Intellectual Property Precautions

**Social Media Scenarios:**

1. Sharing a Compliment
2. Tweeting for Others
3. Personal Endorsement
4. Social Media Support
5. Blogging Incentive
6. Damage Control
7. Disclose or Not to Disclose?

**Policy Case Scenarios**

1. An Invitation

**Option A:** You have been invited to attend the opening night performance of a highly acclaimed play. The invitation comes from a senior member of a firm hoping to do business with **[Insert Company Name Here].** This person has also invited you to join the party for a dinner at a new fancy restaurant before the performance. What should you do?

 \_\_\_\_\_ Accept tickets and dinner

 \_\_\_\_\_ Do not accept tickets and dinner

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B:** A client asks you to make a contribution to a cause for which they’re soliciting, suggesting that you add a few hours to your next bill. What should you do?

 \_\_\_\_\_Add hours to bill

 \_\_\_\_\_ Say no

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2.Kevin’s Dilemma

Kevin is new to agency life. He used to work in the corporate world. He often struggles with tracking his time and questions what is “fair” to the client. He is not sure what to do when he spends more time than he should on a piece of work or has to re-work something that is due to his own inexperience. How would you advise Kevin?

\_\_\_\_\_ Record actual hours worked for each client

\_\_\_\_\_ Put in the time needed but not charge client for the re-work

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. Sally’s Billable Hours

Sally is a recent university graduate and has taken her first job at **[Insert Company Name Here]**. She has been assigned to two accounts⎯one modest and one large account. Sally has been told by her supervisor to spend her time and effort commensurate with the size of each account. Sally developed a good working relationship with one of the executives at the smaller account and really believes in the product. Thus, she is finding herself spending more than the allocated time on this account. She turned in her time sheet to her supervisor with the same number of hours for each client. The supervisor called Sally into his office and said that she should not be working so many hours on the smaller client. He let her know that this time allocation is not acceptable. What should Sally do?

 \_\_\_\_\_ Change the hours billed to reflect size of the account

 \_\_\_\_\_ Continue to do what she thinks is right

 \_\_\_\_\_ Discuss the situation with the partner-level in charge of the team

 \_\_\_\_\_Change her practice going forward to allocate her time properly

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

4. Providing Referrals

**Option A:** At a number of fundraising and social events, you’ve become acquainted with the brother of one of your chief client contacts. Nice guy, smart guy. He’s looking for a job shift and aims to work for a PR agency or in a corporate communications setting. Your client asks if you can provide a reference on his brother’s LinkedIn page. Do you?

\_\_\_\_\_ Provide the reference

 \_\_\_\_\_ Deny the client’s request

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B:** You have been asked by the client to hire a person they know personally for an upcoming on-site project. Then, the team was asked to “find a place for him” as part of our on-site team. How do you handle this situation?

\_\_\_\_\_ Provide the position

 \_\_\_\_\_ Deny the client’s request

 \_\_\_\_\_ Say you will ask your office leadership what the company policy is and get back to them

**Option C:** Your client is the CEO of company X. You were hired to provide strategic counsel to him and work with his PR team on internal and external communications relating to a significant upcoming announcement. During the course of your work, the PR lead sent you an email (from her company account to your company account) asking about employment opportunities at FH. What do you do?

\_\_\_\_\_ Reply to the PR lead that you will forward this information to your Human Resource Department for processing.

\_\_\_\_\_ Say that we are discouraged from having recruitment conversations off the record while we’re working on an engagement. When the project is done, I can connect you to the right people.

\_\_\_\_\_ Ignore the email and if it come up again, tell the PR lead to contact your Human Resource Department.

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

5. Follow Recruitment Policies

A reporter, Jenna, who is covering a number of your clients, expresses an interest in coming to work for your firm and asks for your help. Or a client, Sally, expresses such an interest. How would you advise Jenna and Sally?

\_\_\_\_\_Advise with information about the appropriate application process

\_\_\_\_\_Suggest you will put in a good word

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. Credit Where Credit is Due

**[Insert Company Name Here]** and a competitor agency share the same client and are both working on the same project. While both agencies are involved, the client and competitor agency receive extensive praise in a major industry publication even though **[Insert Company Name Here]** did most of the heavy-lifting on the project. You have a personal, anonymous email account and want to leave a comment on the industry publication’s website that “sets the record straight.” Is this okay?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Managing Client Relationships

**Option A:** You are the CRM for one of the firm’s largest and longest-standing accounts. A junior member of your team tells you, in confidence, that the primary client contact has made some suggestive (offensive/inappropriate) remarks toward another member of your account team. What course of action do you take?

\_\_\_\_\_ Ignore the junior member’s comments

 \_\_\_\_\_ Address the client contact regarding the suggestive remarks

\_\_\_\_\_ Immediately discuss the issue with your manager or HR representative

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B:** You are the CRM for a client that wants to send a videographer out to shoot some footage of an event in which the client is participating. The client wants someone from the account team to accompany the videographer and during a meeting the client loudly and emphatically decides it should be a particular team member because, “she’s young and pretty and will get people to respond to her.” This was said in a room full of other staff members, men and women, young and middle-aged. What course of action do you take?

\_\_\_\_\_ Ignore the comment and assign her to the shoot

\_\_\_\_\_ Address the client contact about the suggestive remarks by saying we will look at what’s needed for that shoot and assign the best person for the assignment. You can then go back and address this with the client privately after the meeting and discuss with your supervisor and/or office manager.

\_\_\_\_\_ Address the client contact about the suggestive remarks by asking that person to meet you privately after the meeting and then discuss with your supervisor and/or office manager.

\_\_\_\_\_ Immediately step in during the meeting, denounce the suggestion as inappropriate, make clear your firm does not view that as acceptable behavior, ask for an apology for your colleague and then discuss afterward with your supervisor and/or office manager.

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option C:** You are the manager of a female Asian-American. Someone from your team asks that employee to join him on a call with the assumption that she speaks Mandarin (she does not). When informed by said employee, the team member laughs it off and makes an off-color remark about it. The employee runs into your office in tears. What course of action do you take?

\_\_\_\_\_ Laugh it off, too, and tell her to lighten up, it is nothing personal

 \_\_\_\_\_ Address the team member regarding the inappropriate and hurtful remarks

\_\_\_\_\_ Immediately discuss the issue with your manager or HR representative.

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

8. Separating Personal and Client Relationships

A client, **[Insert Company Name Here]**, threatens to withhold all or part of an invoice unless you help them with a personal matter. What would you do?

\_\_\_\_\_Help client with the personal problem

\_\_\_\_\_Advise the client of invoice payment policy

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

9. Targeted Marketing

As part of a larger word-of-mouth marketing campaign for a large food and beverage client, **[Insert Company Name Here]** has been asked to support a fun online promotion targeting the ‘tween crowd.’ The client identifies a tween as a child between 8-12 years old. The product is perfectly acceptable for this age group. Are you fine with promoting the program?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

\_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

10. Maintaining Trust

You are part of a team pursuing new business for a potential client – and there’s some sensitive information involved. You’re at lunch with a group of colleagues, who are eagerly asking you about the big project you’re working on. What is your reply?

\_\_\_\_\_ Tell them some basic info that doesn’t seem super-confidential

 \_\_\_\_\_ Tell them that all the information is confidential and, sorry, you can’t talk about it

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

11. Voting Rally

Your client, a non-profit, is neck-in-neck in an online voting contest. With only one day left to vote, you want to rally the **[Insert Company Name Here]** network to help support your client. You decide to draft an email to the entire network asking anyone interested to please vote to help the client win the contest. Is there anything wrong with this approach?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Ethical Dilemma Scenarios**

12. Sam’s Assignment

A trade association representing a sector of public utilities is concerned about the potentially damaging contents of a forthcoming study by an environmental group. Many expect the study will reveal that the utilities in one region of the country have contributed to fouling water sources, though the environmental group has not let on at all about what is exactly in the report. Your client at the association asks you to undertake some detective work to learn about the findings in advance of their release. He asks you to call the group, posing as a graduate student, seeking information about the study. What do you do?

\_\_\_\_\_ Call the group, posing as a graduate student, and gather and share the information

\_\_\_\_\_ Refuse the client’s request

\_\_\_\_\_ Tell the client you need to discuss this with your CRM or supervisor first

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

13. Product Safety

You are working on a project to help defend a medium sized client who is being criticized for selling an unsafe product. Midway through the assignment, you begin to suspect your client is not giving you accurate information. You make this assessment from casual conversations you have had from lower level employees. How and to whom do you raise your concern?

\_\_\_\_\_ Go to your supervisor and ask for guidance

 \_\_\_\_\_ Write a memo outlining why **[Insert Company Name Here]** should resign the account

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

14. Sandy and Jim

Sandy was in a meeting with Jim and their supervisor. Jim has been at **[Insert Company Name Here]** for several years and is a very gregarious individual. In Sandy’s opinion, he seems to talk more than he works. Sandy and Jim are presenting the results of a research study to the supervisor and the supervisor said this is good work. Jim said thanks and that he was the lead person on the research. Sandy knew that the report was the work of a team member and Jim only played a minor role of putting the PowerPoint slides together. Should Sandy speak up now?

 \_\_\_\_\_ No, she should wait to talk to her supervisor privately

 \_\_\_\_\_ Yes, she should stop the meeting

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

15. Relevance of the Past

**[Insert Company Name Here]** has been hired by a large and profitable hotel chain that has been subject to negative news stories about the chain’s allegedly unfair treatment of the hotel’s maids and porters. The worker’s discontent has led to union picketing at the hotel and still more unfavorable news coverage. You, as the account executive, have not been able to come up with positive news stories that reporters are likely to use, so you decide to try to neutralize the union's efforts. Your research uncovers information that five years ago the union leader was investigated by federal agents who looked into misuse of union funds. Do you use this information?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

16. How Much to Report

You have a nonprofit client that asks you to report on its progress in securing donated goods. In a meeting with the staff of the agency, one of the lower level employees questions the accuracy of the amount of donated merchandise. She states that it is much smaller than reported and the executive director says it is only inflated a little. The nonprofit agency says it needs to report on past successes to secure future donations. What do you do?

 \_\_\_\_\_ Follow the executive director’s directions

 \_\_\_\_\_ Do more checking to substantiate the lower level employee’s statement

 \_\_\_\_\_ Talk to your supervisor before doing anything

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

17. What Kind of Press Release?

**[Insert Company Name Here]** has been hired by Behemoth, Inc., a large auto manufacturer. A new model, the X3000, will be in dealer’s showrooms in a few weeks. Behemoth has also hired an independent consumer testing service to evaluate the X3000. The results from its tests, available only to company executives and **[Insert Company Name Here]** staff, are mixed. It praises the X3000 for its styling and acceleration, but it sharply criticizes its low gas mileage and the lack of the latest safety equipment (which is not considered life-threatening). Management asks you to prepare a very positive press release that quotes from the favorable portion of the testing report, while making no mention of the criticisms. The VP of Marketing’s last words to you were: “Be sure to call the car safe.” How do you respond?

\_\_\_\_\_ Use only the favorable information for the press release

 \_\_\_\_\_ Prepare a balanced press release

 \_\_\_\_\_ Consult with higher level managers at **[Insert Company Name Here]**

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

18. Taking an Assignment

**Option A:** The firm wins an assignment to help a client with the public affairs around a development in a country that has been criticized for its human rights record. You have strong views on this issue and consider yourself well informed about the country in question. You are asked by your supervisor to work on this account. Should you accept?

 \_\_\_\_\_ No

 \_\_\_\_\_ Yes

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B:** Your agency has been approached by a well-financed organization whose members oppose abortion. They seek your help with a national campaign to promote pro-life philosophies. Although you and some other staff do not support these views, you know it would be a highly lucrative account. What do you do?

 \_\_\_\_\_ Accept and find people who do not oppose issue to work the business

 \_\_\_\_\_ Turn down the business

 \_\_\_\_\_ Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

19. Employee Layoffs

One of your biggest clients has gone through a period of significant downsizing. Employee morale is low and management has reported to you that some of its best employees may leave to go to a competitor. You are asked to prepare an announcement that employee layoffs are complete. You suspect, based on informal conversations, that this may not be the case. What position do you take?

 \_\_\_\_\_ Refuse to prepare the announcement

 \_\_\_\_\_ Prepare the announcement as directed

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

20. Award Nomination

Your client has an eye on a particular prize – a coveted CSR award. But, in order to be considered, your client needs to be nominated by another company. Your peer client contact asks that **[Insert Company Name Here]** submit a positive nomination. You’ve worked with this client for one year, with a good relationship. What should you do?

 \_\_\_\_\_ Nominate the client

 \_\_\_\_\_ Deny the nomination request

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

21. Maintain Client Confidentiality

You come into possession of competitive information of one client, **[Insert Client Company Name Here]**, that you know another client, **[Insert Client Company Name Here]**,would value having. Should you offer a tip to your client contact at **[Insert Client Company Name Here]**?

 \_\_\_\_\_Utilize information to improve relationship with the client

 \_\_\_\_\_Don’t share the information

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

22. Twice the Work, Half the Effort

The **[Insert Company Name Here]** team is conducting a social media audit for a client whose audience is young adults. Shortly after the social media audit is concluded, a new client opportunity presents itself. The new potential client is targeting the same audience, young adults. The team working on the new business effort knows about the social media audit you recently conducted for the existing client and asks to review the results to help them with their new business response. Is it okay to share the social media audit findings paid for by the existing client with the team working on the new business effort?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B:** You represent a major software maker and a small hosting company. The software maker stages a massive annual event for developers and IT professionals, and pays for 10 media people and bloggers to fly down and attend the event. As a partner of the bigger company, Company B has a stand at the event, and has requested interviews and interaction with the visiting media, giving lavish gifts (including e-readers) as inducement. The dilemma is that the software maker is hosting and paying for the media, but Company B wants to hijack them and hog the headlines. How do you keep everyone happy?

 \_\_\_\_\_You don’t. You tell Company B that this is not possible.

\_\_\_\_\_ Propose a solution that Company B have access to selected media outside of the hosts’ critical sessions and interviews. Also, set up interviews that include representatives from both companies to provide a broader discussion and third-party endorsement of each other.

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

23. Promoting the Truth

Negative (and personally uncomfortable) claims are being made against your client’s CEO. Your client contact directs you to write some talking points that refute the claims… but he won’t comment, one way or the other, whether they’re actually true. How much more should you press him for additional information? And what’s your move if you can’t get a feel for the true facts?

 \_\_\_\_\_ Prod him until he tells you everything.

 \_\_\_\_\_ Go ahead and write up what he tells you.

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

24. Client Relations

The pressure is on with a current client. The seven-year itch is approaching … and making things even more dicey, the results on a recent project were a bit beneath the client’s expectations. You, as a junior-level member of the team, hear your mid-level manager talking to her client counterpart… and she’s lying about some aspects of the recent project. Do you confront your manager? Or tell her boss? Or keep quiet?

\_\_\_\_\_ Confront your manager

 \_\_\_\_\_ Tell your manager’s boss

 \_\_\_\_\_ Keep quiet

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

25. Security Breach

Participating in an emergency high-level meeting with your financial services client, you learn a startling fact: there’s been a security breach – one that’s exposed the personal information of millions of people. You are receiving calls from several media resources to provide a statement addressing the issue. The client is emphatic that, for now, they’re going to sit on the information… and bury it, if possible. The client instructs you not to respond to the media calls. Due to NDA, you’re technically unable to report or act on it. What is your counsel to the client? What if they disagree?

 \_\_\_\_\_ Consult with your manager or CRM on how to handle this request

 \_\_\_\_\_ Ignore the clients request and provide insights to the media

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

26. Media Coverage

**Option A:** An **[Insert Company Name Here]** office has just taken on a new client and this client desperately wants media coverage to promote the firm. You are an account executive and have heard that it is possible to secure positive stories in the client's local media just by paying for them. How should you proceed?

 \_\_\_\_\_ Pay for stories

 \_\_\_\_\_ Do not pay for stories

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B:** You learn that a publication is about to publish a story with information that is highly embarrassing to your client, yet true. Your client leans heavily on you to get the story killed. It turns out that the editor who oversaw the reporting is someone you have known and worked with for years, and you and he have a good rapport. Indeed, he “owes you one” since you have steered several exclusive interviews and other good information his way enabling him to scoop his competition. What do you say to the editor?

 \_\_\_\_\_ Tell him it would really be a big favor if you would just kill this story

\_\_\_\_\_ Level with the client in a diplomatic fashion and provide our best effort to manage and rehabilitate the client’s reputation once the story is out

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

27. Opinions about the Competition

You are an account executive at **[Insert Company Name Here]** competing with one of **[Insert Company Name Here]**’s fiercest rivals for a big corporate account. This potential business would add significantly to the bottom line and could be a boon to your career. You are asked by the potential client to comment on the abilities of the competitor, which, in your opinion always overstates its competencies and accomplishments. What do you say?

 \_\_\_\_\_ Tell the person that it is company policy not to comment on competitors

\_\_\_\_\_ Refer the person to one of your accounts that you know had a mixed experience with the competitor

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

28. Dealing with Client Conflict

**Option A:** Joe, a new account manager, receives a telephone call from the vice president of marketing for a major consumer packaged foods firm. The company is currently not a client of **[Insert Company Name Here]**, but **[Insert Company Name Here]** does represent a direct competitor on one of their product lines. The VP tells Joe that he would like **[Insert Company Name Here]** to bid on a contract for PR and a website for a new line of products that on its face does not seem to compete. Joe’s manager is on vacation and the VP wants a proposal before she returns. Joe is uncertain whether he should instruct his staff to begin working on a proposal. What do you think he should do?

 \_\_\_\_\_ Tell staff to begin working on a proposal

 \_\_\_\_\_ Call the competitor and explain the situation to that firm

 \_\_\_\_\_ Call the manager on vacation for guidance

 \_\_\_\_\_ Go to your manager’s manager and discuss the situation

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Option B**: Company A, a prominent pharmaceutical company would like to hire your firm to help it communicate its position on a complex regulatory matter pending at the Food and Drug Administration (FDA) in Washington that could affect its “blockbuster” drug. Company A is offering to pay you a reasonably good monthly retainer for the work, revenue that you need at a time when the economy is softening. But it is not nearly as much money as you are making from Company B, which produces a product that is a direct competitor to the Company A’s “blockbuster” drug. You represent Company B’s product on other regulatory issues in Washington, but not the same pending matter at the FDA. One of your firm’s senior managers recommends that you not inform either of the two companies of your relationship with both. He reasons that there is no real conflict of interest here, and, besides, there will be a strict “firewall” between the two teams working in the same office for each of the clients (that is, no sharing of information about either client). But you know that both companies are extremely sensitive about anything that might support its competitor’s drug. Did the senior manager make a good call?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Not sure

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

29. Transparency Not Just a Social Media Issue

A developer hired us to help forward the idea of the city committing funds to using a derelict property downtown to commence a new attraction. There were public hearings on the topic. We attended to monitor for him, and even worked to get third parties to speak in favor of the idea. We also invited the media, working with the pertinent beat reporter at the local newspaper. We were under strict instructions to not reveal that we were representing him. That information would have tainted the proceedings as the story of our employment would have been the news of the day. “Developer hires PR firm to influence city action in his favor.”

We accepted the assignment based on his promise that we could reveal his involvement “soon.” It went on longer than expected. Finally, the newspaper reporter asked us for whom we were working. If we said, “We can’t say,” it would be a red flag. If we said, “For one of those third parties,” it would be a lie. If we said, “For the developer,” it would become the story. What should you do?

 \_\_\_\_\_ Tell the reporter we can’t say

 \_\_\_\_\_ Tell the reporter for one of the third parties

 \_\_\_\_\_ Tell the reporter for the developer

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

30. New Business vs. Existing Clients

Cheryl has been working on a customer event her manufacturing client has had planned for several months. The client is one of the more respected firms in the office for its size, longevity and steady growth in budget over the past decade. Cheryl is skilled and experienced in several B2B capabilities and has worked evenings all week, with two weeks to go before the event. Her client is very happy with the progress being made. This morning, Cheryl was called into a meeting with her supervisor and the office manager and asked to lend her special talents for the next four days to assist a new business team that has been asked to respond to a new branding RFP for a nationally-recognized food company. Landing this client would be an important win for the office. She will be expected to devote more than half her time to this new effort. Fearing that all her hard work on her client event could be harmed if she is pulled away, she complains to her colleagues that her managers can’t seem to decide priorities, and she debates declining to participate in the new business effort. What should Cheryl do?

\_\_\_\_\_ Decline the new business and bring home a winning event for her client

\_\_\_\_\_ Talk with her supervisor about her workload concerns

\_\_\_\_\_ Take no action and continue to complain

31. Intellectual Property Precautions

You are producing a marketing video for a client for the first time. The client is introducing an innovative new product and there is a lot of industry buzz. You find a location that is eclectic and interesting, an entrepreneurial, collaborative workspace – lots of individuality, lots of self-expression. Your team shoots the video. It is wonderful and vibrant. Then your colleague notices that there are colorful athletic shoes on a table in the foreground and the logos of three major brands are on shoes in front and center on the screen. The brands have nothing to do with the client’s product. You’ve already shown the client team the video and they love it – especially the vibrancy and colors. What is your next step?

 \_\_\_\_\_ The video is for a social media campaign and won’t be seen by an extremely large audience so it’s fine to use in this

 case

 \_\_\_\_\_ Get advice from an expert or senior manager

\_\_\_\_\_ Explore other options - find out the cost for leaving the marks in, reshoot, fuzz out the marks, or edit the video so the

 marks are no longer visible

**Social Media Scenarios**

32. Sharing a Compliment

A third party blogger sends feedback to you via a direct message on your personal Twitter account (a private message) raving about a particular **[Insert Company Name Here]** client’s campaign. You decide to share this information with other members of the **[Insert Company Name Here]** team as an FYI and they want you to take a screenshot of the direct message from your personal Twitter account to share in a client presentation. Is the account team’s request appropriate?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

33. Tweeting for Others

An **[Insert Company Name Here]** colleague has more than 40,000 followers on Twitter and one of his/her tweets can potentially result in over one million impressions. You’ve set a goal of 5 million impressions for a specific hash-tag created for a client campaign. You’re about 2 million impressions short and the campaign ends in three days. Do you ask your colleague to “do you a favor” and tweet it for you?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

34. Personal Endorsement

You are excited to be promoting an **[Insert Company Name Here]** client’s new gardening product, Product X. Product X truly is revolutionary, you really believe in it, and you want to share the news with your personal Facebook network, which includes some friends from around the **[Insert Company Name Here]** network. You publish the following status update on your personal Facebook page:

*“Check out Product X. It is one of the most amazing things to come along in the gardening world in the past 10 years. Don’t believe me? Just visit* [*www.ProductX.com*](http://www.ProductX.com) *and let me know what you think!”*

Is it appropriate to share a status message of this nature on your personal Facebook page (or personal Twitter feed or personal blog)?

 \_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

35. Social Media Support

Your team has just begun work with a new client who has made it clear that their number-one expectation is for some social media success. Your supervisor asks you to go online – to various websites, bulletin boards, ratings/reviews sites, Twitter streams – and insert yourself into the conversation as a “regular person.” Your charge is to comment positively about the client’s product and the company overall. Are you okay with this?

\_\_\_\_\_ Yes

 \_\_\_\_\_ No

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

36. Blogging Incentive

You’re performing some online editorial outreach with a number of key bloggers. One suggests he’d be willing to provide coverage about your client – particularly if there was a “gift card” that might accompany the media kit. What’s your next step?

\_\_\_\_\_ Give the blogger a gift card

 \_\_\_\_\_ Deny the blogger

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

37. Damage Control

You receive a phone call from a key client who is fuming over some outrageously false and libelous information that’s been posted about the company’s CEO on their Wikipedia page. “Get it off there… now! I don’t care how – the truth is the best defense!” She goes on to suggest the best route is to just create a generic user name and edit the copy out. What’s your response?

\_\_\_\_\_ Create a generic account and edit out the comments

 \_\_\_\_\_ Explain that anyone can post anything on Wikipedia

 \_\_\_\_\_Talk with your manager about the appropriate messages to the client

 \_\_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

38. Disclose or Not to Disclose?

Your team recently won a competitive pitch to launch an integrated campaign to promote a fashion brand’s new apparel line. The campaign includes partnering with online influencers to review the clothes in exchange for free product.

One of the blogger partners writes a positive review of the new jacket on her blog and mentions that she received it for free from the company. In the post she links to her Instagram post where she is wearing the embroidered jacket with the company logo but does not mention the brand in the Instagram post copy. What do you do?

\_\_ Nothing - we aren’t paying the bloggers, we’re just giving them free clothing so they can review the product.

\_\_ It’s up to the blogger to disclose their relationship with the brand. She mentions that she got the clothing for free in the

 blog post so there’s no concern.

\_\_ Ask the client to consult their legal team for advice.

\_\_ Contact the blogger and ask her to update the Instagram post to disclose that she received the jacket for free.